

**PROCESSING PROCEDURES TO AWARD A&E SOLE SOURCE
CONTRACTS **REQUIRING** COUNCIL APPROVAL**

Follow these steps in the order listed below to process a Sole Source Approval request valued over \$250,000 for Non-CIP Funded Contracts or over \$1M for CIP Funded Contracts (i.e. for A&E Consultant contracts awarding via an **e1472** requiring Council Resolution or Ordinance):

1. After PWC Consultant Services Coordinator (CSC) provides the Project Manager or Initiator (PM) the boiler PM finalizes negotiations with Sole Source consultant and adds their project specific information to the data fields of the boiler
2. PM forwards the draft Agreement in Microsoft Word format to PWC for review. Only the boiler obtained from PWC shall be used as no other boilers are acceptable. The consultant does not sign the agreement at this stage of the process. The draft Agreement must include:
 - a. Exhibit A – Scope of Services,
 - b. Exhibit B – Compensation Schedule, and
 - c. Exhibit C – Time Schedule
3. After PWC reviews the draft agreement, the project manager shall forward the draft to their department's Deputy City Attorney for review. Once this review process is complete, the project manager can forward four (4) PDF or hard copies of the agreement to the consultant for final signature.
4. The PM may start routing their award document (Form E-1472) at this time. The PM should also update their Purchase Requisition to include the name of the selected consultant and the contract number for the agreement. The contract number should be typed into the "Texts" field.
5. Once the E-1472 is ready for Docket (City Council Approval), the PM attaches the original contracts (4 total), a copy of Comptroller's Certificate, insurance and endorsements and forwards the package to the Docket Clerk.
6. The E-1472 goes to Council for approval and then the contracts will go to the City Clerk (if approved by Council).
7. The City Clerk should notify the PM when all four contracts are ready for pick up. Note: This document package is not automatically forwarded to PWC. After the Mayor's 10 day veto period has passed, it is the PM's responsibility to follow up with the Clerk's Office, pick up the package, and deliver it to PWC.
8. The PM returns all four contracts (plus a copy of E-1472, a copy of Comptroller's Certificate, and insurance certificates + endorsements) to PWC.
9. PWC reviews the E-1472, contracts, Comptroller's Certificate, insurance and endorsements, signs the contracts and then forwards the package to the City Attorney's Office for final review and signature.
10. The City Attorney's Office reviews and signs the contracts and notifies PWC when the contract is ready for pick up.
11. PWC issues a Notice to Proceed (NTP) and distributes the four contract copies as follows:
 - a. Forwards a duplicate original contract to the Consultant along with the original NTP letter
 - b. Retains a duplicate original contract and a copy of the NTP letter for the PWC file

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- c. Forwards a duplicate original contract and a copy of the NTP letter to the PM
- d. Forwards the original contract to the City Clerk and PWC assigns a Purchase Order (PO) number at this time.